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ABSTRACT

Trust agreements are cooperative arrangements supported by the school district and teachers' union leadership to promote local educational reforms. The ability of trust agreements to establish local professional cultures that support innovative teaching in California is examined in this paper. Included are: (1) an outline of the logic that links labor relations with conceptions of teaching and the organization of teachers' work; (2) a description of the impact of trust agreements on the support for and substance of teaching that considers the role of project oversight committees, project scope, and teacher leadership opportunities; and (3) an identification of factors that limit program expansion and the development of new professional cultures. (30 references) (LMI)

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THE TRUST AGREEMENT PROJECTS: ESTABLISHING LOCAL PROFESSIONAL CULTURES FOR TEACHERS[1]

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Trust agreements are cooperative arrangements supported by school district and teachers' union leadership to promote local educational reforms. Since 1987 a number of California school districts have been engaged in forging labor compacts, distinct from collective bargaining contracts, that support programs which address issues such as school and district governance, teacher preparation and evaluation, and curriculum development--issues that typically have not been approached through conventional bargaining agreements. In the process, labor-management relations tend to improve; and the formation, implementation, and oversight of the reforms generate a variety of new leadership positions.

What follows is an early assessment of what stands at the heart of these endeavors: their ability to establish local professional cultures that support and enhance teaching beyond what schools and districts traditionally provide. This paper outlines the logic that links labor relations with conceptions of

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teaching and the organization of teachers' work. It describes the potentially significant the impact of trust agreements on the support for and substance of teaching by considering the role of trust agreement project oversight committees, the breadth of some of the more typical programs and projects, and opportunities for teacher leadership. It also identifies some of the features and forces which act to inhibit program expansion and limit the establishment of new professional cultures.

This paper emerges from a study of the processes by which the first dozen trust agreement projects took shape and the meaning, substance, and variety of the agreements and projects (Lieberman & Bascia, 1990). In each district interviews were conducted with approximately a dozen participants: school and district administrators, board members, union presidents and other union leaders, teachers who coordinate and carry out the major responsibilities of the projects, and teachers who were the primary program beneficiaries.

Since the establishment of collective bargaining in public education in the past twenty-five years, union involvement in district policy setting has been criticized for increasing bureaucratization of teacher-administrator roles (Johnson, 1984; Mitchell & Kerchner, 1983; Simpkins, McCutcheon, & Alec, 1979; Williams, 1979), causing the ineffective implementation of reform policies (Johnson, 1984; Kerchner & Mitchell, 1986; McDonnell & Pascal, 1988; Simpkins, et al., 1979), and perpetuating a conception of teaching as labor rather than craft or professional

work (Bacharach & Shedd, 1988; Carlson, 1987; Kerchner & Mitchell, 1983; Mitchell & Kerchner, 1986, 1988; Mitchell, 1988). While many of these criticisms reflect the perspectives of administrators and policy makers concerned about constraints on their own authority, union leadership has also been seeking ways of increasing teacher involvement in making decisions that affect their work.

Trust agreements are intended to augment collective bargaining by establishing alternative forums where substantive educational issues can be discussed, "a process by which teachers and administrators can work together as colleagues to initiate and implement innovative projects" (PACE, 1987). By focusing directly on projects of interest to both teachers and administrators, they are intended to circumvent some of the adversarial tone and economic emphasis inherent to collective bargaining.

The idea of collaborative labor relations is consonant with notions of school restructuring in several important ways. It is based on the premise that a variety of educational stake-holders who may have never worked together--and who may in fact have been political adversaries--can form coalitions to support new educational programs at local as well as state and national levels. It embodies the notion that educational reform efforts should be sensitive to local contextual differences in educational needs and values. Unlike many earlier efforts which considered reforms as discrete attempts to tinker with static

organizations, it suggests a more holistic model of schooling, where any reform attempt can and will interact with other organizational features and may lead to a sequence of changes. It begins with the assumption, for example, of the links between the substance and tenor of local labor relations and local teaching practices and the potential changes in the latter changes in the former will cause.

The trust agreement districts were given $5,000 a year to collaboratively organize an educational project and develop a written agreement that delineated understandings of program organization and support. The project was funded by The Stuart Foundations; PACE (Policy Analysis for California Education) administered the program and provides important support and guidance. While the trust agreements constitute a discrete reform effort, cooperative labor relations and the variety of local programs they have spawned are not unique: union-administration accords and teacher involvement in decision making are fundamental components of many current restructuring efforts across the country. Toledo's Intern-Intervention Program, which began in 1981, may have been the first prominent example of labor-management collaboration (Rauth, 1990); since then, in a growing number of districts, unions have become major proponents of schemes to redefine both their own roles and teachers' authority relations in schools (American Educator, 1987; Casner-Lotto, 1988; David, 1989; Elmore, 1989; Johnson, 1988; Rosow & Zager, 1989).

Crafters of the concept of trust agreements were primarily interested in promoting productive labor relations and envisioned the projects they spawned means of achieving them. Leadership in districts invited to consider a trust agreement had a variety of motives for becoming involved. Some had enjoyed a history of informal labor-management cooperation and understood the project as means of formalizing and expand those productive relationships. In other districts, leaders perceived a dire need for particular programs that would require support and cooperation between union and administration. In still other situations, cooperative relations and projects had recently been established, but leadership welcomed the opportunity to share information and idea with other similarly engaged districts through the PACE network--to extend the collaborative beyond district boundaries.

In districts where the process has not been impeded, all of these benefits are achieved. Many of the original districts have extended and augmented the original scope and content of their projects, developed additional collaborative programs, increased teacher participation in district and school level decision making, and provided challenging new roles for teachers. The trust agreements have led to changes in district policies, in the organization and delivery of district support for teaching, and in the substance of the collective bargaining contract. In essence they have moved toward changing the local professional culture of teaching.

The next three sections describe how trust agreement oversight committees, new cadres of teacher leaders, and the programs themselves can lead to a series of changes in the substance of and support for teaching. The final section attempts to delineate some of the challenges these projects face and early indications of their vulnerabilities.

The power of trust agreement oversight committees

The working groups responsible for program development and oversight are a major component of the trust agreement projects. A union president may contend that "The real trust agreement is between me and the superintendent"--and indeed, the securing of resources and provision of legal and procedural niches within which these programs can flourish are crucial tasks only these leaders can accomplish. Other oversight committee members, however, perceive their collaboration as the heart of the reform projects in both substantive and symbolic terms.

Typical committees are made up of 6-12 members and are likely to include assistant superintendents, the union president, district office staff whose areas of responsibility are impacted by the program, site administrators in good standing among district principals, school board members, teachers who serve in advisory capacities, and teachers responsible for the direct coordination or delivery of project services. In developing and supporting the project, these individuals serve as liaisons to--and run interference with--their various local constituencies.

Particularly in small districts, many team members may actually embody several relevant roles--for example, an assistant superintendent may supervise principals and also be a member of the district committee that reviews and approves teachers' proposals for special curriculum development grants.

The trust agreement project typically marks the first time many of the team members have worked together collaboratively. In the process of forging the trust agreement, committee members begin to recognize and rely upon each others' expertise, knowledge, and contacts. Exposure to new perspectives and the availability of new information may lead to improvements in working relations, resource allocation, and district procedures beyond the scope of the trust agreement project. For example, trust agreement team members report changes in the distribution of classroom materials, in teacher assignment policies, and teacher evaluation instruments as the result of the new communication patterns provided by the oversight committees.

Such interaction is likely to generate the development of a common perspective and language. In one district, for example, where the trust agreement project is a peer assistance program for new teachers, the advisory group's hearings of recommendations for new teachers' promotion or dismissal have evolved into sophisticated exchanges about pedagogy, content coverage, classroom management, and collegial relations--the articulation of a position on "what we expect from our teachers."

Some teams perceive their mission in broad terms: in one district, where the group began with a series of general philosophical discussions, committee members are frank about their desire to completely transform the local school system, reform by reform. Other teams are more pragmatically oriented and try to limit their focus to the scope of the project they oversee. Some work hard to keep their interactions distinct from what occurs at the bargaining table while others discover reasons to include some elements of their agreements in the formal contract. Because most of the trust agreement programs fundamentally affect teachers' rights and responsibilities, changes in contract provisions are a likely outcome. Even where there are attempts to "protect" uninvolved schools and teachers from the unintended consequences of these new reforms, the legal authority vested in trust agreement team members may result in more pervasive changes in teachers' working conditions.

Involvement in trust agreements may lead to apparent shifts in union strategy. In some districts, long histories of cooperative relations have meant prompt and informal resolution of potential problems before they became matters of general knowledge, but the spotlight on the alliance may make such cooperation more apparent. In other districts, it is obvious that the dynamics between union and administration, and union and teachers, are changing. In one district, for example, the union has proposed to its members that, in exchange for a procedure for peer assistance, it no longer automatically defend all teachers

who receive unsatisfactory evaluations. While such a proposal might have been greeted in the past as evidence that the union was "selling teachers out," teachers now seem to perceive such a strategy as a move toward professional self-regulation.

Teacher leaders

The teachers who serve as oversight committee members, program coordinators, master teachers, liaisons to restructuring schools, and so on are typically selected for these positions by union leadership on the basis of their commitment to the union, their extracurricular professional roles (such as mentoring, curriculum development, or innovative program coordination), and their reputations as highly competent classroom teachers. Their participation provides the projects with credibility in the greater district community and ensures advocacy of the union's interests. What is most striking about these teachers is their long held understanding of a logical connection between union activism and reforms that increase teacher involvement and commitment to practice. Their perceive their opportunities to participate in the trust agreement projects as both "wonderful" and "obvious."

Some districts release these teachers from their regular teaching duties to work on the projects full time; in other districts, teachers' involvement is largely extracurricular. They are acutely sensitive to the fact that they carry the bulk of responsibility for the success of their programs. They must not

only establish new procedures and organize their time effectively but convince local teachers and administrators of the project's value and legitimacy as well as of their own expertise and credibility. They must incorporate the emerging values of the district oversight team with their own sensibilities working professionals.

The time and energy demands of these roles are considerable, but these teachers seem to regard them as professional challenges: a consultant who works with new teachers remarks that "it takes everything I ever learned about teaching and more." Their involvement allows these teachers valuable new perspectives on the mechanics of teaching and the organization of schools. Their interactions with teachers and administrators convinces them that their roles are "absolutely critical" in fulfilling enduring district needs. They believe that they are "advancing the profession;" they see themselves as "pioneers."

They perceive their positions as augmentations and supports for teaching. Some are eager to return to the classroom to test their new knowledge and because they are concerned that "other excellent teachers need the opportunity to do this job." Others are interested in pursuing the "logical" extensions of their current responsibilities, but their motives are to support teaching, not to abandon it. For example, a consultant for first year teachers looks forward to working on the special training and support needs of second year and tenured teachers. In another district, a member of the professional development committee has

developed a plan for an alternative school and challenged district leadership to "put its money where its mouth is" and support this grass roots effort.

Their credibility with their oversight groups, district personnel, and teachers is likely to lead to these teachers' involvement in additional local reform projects. The coordinator of a teacher training support program now co-chairs a district-wide planning committee to promote school restructuring. In another district, a program coordinator is pleased that district administrators who he formerly met "only across the bargaining table" now include him in decision making.

While many local unions have long maintained committees to address such issues as community relations and professional development, union presidents typically lament the lack of sufficient teacher interest or motivation to make these efforts viable. The visibility and attractiveness of new roles for teachers appear to be much more effective in establishing a perception of the union as a locus for professional involvement. Several districts report increases in union membership as a result of the trust agreement projects.

The breadth of programmatic reform

For teachers who lead the projects, their utility is obvious. For trust agreement team members the logic of expansion and progress is compelling. While they may express some political sensitivity by first attempting the "easiest, natural step, the

least threatening," they are also optimistic about the potential that the reforms will eventually transform local teaching and learning processes. They describe the projects in terms of their potential for promoting a local professional culture for teaching: for example, a teacher-directed staff development program is not only cost-efficient but is expected to encourage curricular innovation, stimulate the development of local "teacher leaders," and empower teachers by demonstrating evidence of their expertise.

Many of the trust agreement projects are typical examples of the kinds restructuring reforms being attempted in many districts across the country--assistance for new teachers, peer evaluation, site-based management and shared decision making, and so on--but at the same time, these programs reflect local perceptions of district needs. For example, one district's peer assistance program is a response to a former union president's concerned that non-probationary teachers were not receiving productive feedback and assistance and that the union could not adequately defend or support them when they were not recommended for tenure. Another district's constrained fiscal situation led to a proposal that teachers assume responsibility for providing staff development. Where possible, trust agreement team members traveled to other districts to research similar programs. Some of the trust agreement districts are in the loop of regional, state, and national organizations and reform coalitions, while others are more isolated and rely more exclusively on semi-annual

contact with other trust agreement districts through the conferences put on by PACE. In any event, ideas and models gleaned from other districts are tailored to meet local conditions and values.

Teacher assistance projects. Several districts' projects concern support for first-year teachers. In these programs, a handful of veteran teachers are released from their own schools to spend their days in the classrooms of probationary teachers observing, providing informal feedback, and demonstrating lessons. They provide instructional materials, arrange opportunities for new teachers to observe other teachers in action, link them to local opportunities for professional development, help orient them to logistics of school and district, and negotiate with principals on their behalf. In coordination with principals, they also conduct formal evaluations and ultimately are responsible for recommendations for new teachers' continued employment or dismissal.

These projects appear to be well-accepted in schools where "consultants" work with new teachers. Principals typically regard them as helpful in considering how they can better support new teachers, conduct effective observations, and provide constructive feedback. In schools where consultants work with probationary teachers, peer observation, assistance, and even formal evaluation quickly achieve legitimacy and value for veteran teachers as well.

In some cases these programs encourage broader shifts in assumptions about the value of teacher interactions. In one district, for example, tenured teachers have begun catching consultants in the halls and asking them to demonstrate lessons in their classrooms. As new teachers' needs for training and collegial interaction are made known to the oversight group, they begin to shape some of the district's professional development offerings. In one district, the trust agreement team has proposed that consultants become responsible for assisting tenured teachers whose evaluations were unsatisfactory, and there has been little resistance from either teachers or administrators.

Staff development. In districts where teacher inservice is a collaborative effort, committees of teachers, district curriculum specialists, and others conduct surveys of teachers' training interests and needs and arrange appropriate courses and workshops. While many presenters are district teachers and administrators, others are outside experts. Topical areas range from instructional techniques to how to construct alternative assessments of student learning, working with students with special needs, first aid, employment issues, and educational reform. In one district, the original project has been augmented by a parallel program for classified staff and by a grants program to send teachers to conferences so they can provide staff development and serve on district and site curriculum planning committees--a deliberate attempt to develop a new cadre of "teacher leaders."

Curriculum development. Initially small and discrete school-based curriculum projects have led to more extensive reorganization of curriculum, scheduling, and teacher-student interactions. In one district, for example, an elementary school's textbook selection project has led to cross-grade planning and thematic organization of the curriculum, staff training days when teachers share information gleaned from their independent professional development forays, increased collegial interactions, team teaching, cross-grade student grouping, interest in developing new forms of student assessment, and increased parent, student, and staff participation in decision making.

Site based management. Several districts are attempting to establish shared decision making structures in schools. Many schools that have been working with new governance procedures for several years have developed complex structures and clear understandings of which decisions--and which duties--are the purview of various committees and individuals. The new governance structures address such issues as scheduling, teachers' professional development needs, student services, staff responsibilities, and student-teacher relations. Curriculum development and articulation typically become group exercises across grade levels and subject lines--in short, these structures can lead to substantive changes not only in the greater school organization but with respect to what occurs between teachers and students in classrooms.

These descriptions of the more typical trust agreement projects illustrate how initially simple and well-bounded programs, once begun, create their own constituencies, easily expand to fill local needs, and encourage broader new conceptions of teaching. These new conceptions, in turn, may generate further shifts in school and district structures, relationships and practices, with further implications for teachers' roles.

Impact and endurance

The trust agreement projects embody many of features that suggest their potential to change local conceptions of and supports for teaching. District leaders, oversight committee members, and teachers leaders are well versed in the literature on organizational change and attempt to ensure some of the major criteria for success: they recognize the practical and symbolic significance of leadership endorsement, the importance of buy-in, sensitivity to local political issues, and the time it takes to institutionalize such fundamental reform. Such knowledge is necessary but not always sufficient: many issues are still not entirely within their control. For all the evidence of the trust agreement projects' impact and success, they also are critically fragile and vulnerable. Transforming cultures requires steady work (Elmore & McLaughlin, 1988).

The philosophy of collaboration so compelling to team members may not be as attractive or obvious to others. In several districts, the process of forging of a trust agreement has been

stopped in its tracks by a change in superintendent or union president. In other district changes in key personnel has meant changes in levels of program support and at least temporary cessation of plans for program expansion. In such environments, programs that survive are likely to function more like discrete add-ons to traditional operations than integrated system components.

Looking beyond leadership, teams, and teacher leaders and into schools within any of these districts, there is evidence of a diversity of responses to the trust agreement projects. The new professional opportunities the projects represent, the new non-adversarial relationship between union and administration, and the new "strong moral stand" they see the union having assumed encourages some teachers to register their approval of by becoming union members for the first time. The fulfilling of a perceived gap in service or support, new ideas or a new vocabulary to describe teaching and learning processes, or permission to experiment are very attractive to some teachers, and some whole school faculties. For other teachers, and administrators, the logic is not persuasive, the need not obvious, and in some cases the whole enterprise is threatening and debilitating.

Many trust agreement teams can identify whole schools reluctant to embrace the new programs. School sites represent important loci for teachers' experience and interpretation of events by virtue of shared histories, social opportunities and

working assignments, and normative environments (see Ball, 1987; Bascia, 1990, 1991; Clune, 1990; Johnson, 1990a, 1990b; McLaughlin, Talbert & Phelan, 1990). The cultural and practical context of a school might result, for example, in the rejection of the notion of school based decision making because of teachers' perceptions of a history of administrative negligence and beliefs that administrative tasks should not be accomplished by teachers. Some programs such as shared decision making or peer coaching are more easily suited to elementary school structures and conceptions of task and hold less attraction for secondary teachers. Projects whose strength lies in addressing the needs of a particular student group may appear irrelevant in schools with other student populations. Presenting a variety of incentives and options increases the likelihood of attracting teachers and administrators' interest.

While attempting to maintain some tolerance for differences in teachers' attitudes and acceptance, many trust agreement team members are uncertain about how to handle less than enthusiastic schools. Even in a district where a Teachers' Association president asserts that "these schools aren't problems, just different," the oversight committee is considering dropping some schools from the project. In other districts schools and teachers experience a distinct pressure from the team for compliance: the principal of a high school who rejected the notion of site based management eighteen months ago because "if it ain't broke, don't fix it," now complains that her school is required to "find some

way of restructuring." Trust agreement teams need to find ways of maintaining their sensitivity and tolerance to diverse school contexts.

The rhetoric of trust agreement projects, like to the rhetoric of restructuring, asserts that teachers must be involved in the development of more appropriate organizations of educational delivery because teachers' expertise is critical to good educational practice (Darling-Hammond & Berry, 1988). There is a danger that union leadership and a select group of teachers inappropriately assuming their capacity to represent the larger group. There is a potential for oversight teams to lose their representativeness and for the new leadership order to function much like the traditional hierarchical model. In one district, team members acknowledge the "permanent, non-hierarchical power of team members [within the team]...always the same players across many contexts...and then there's everyone else." Long attuned to the nuances of mandate and compliance, teachers and administrators are quick to sense when teams have lost their capacity for reflection and responsiveness. While team stability may be useful in some ways, representativeness is important not only in symbolic terms but in order to ensure that teams reflect the interests and concerns of working teachers and administrators.

Finally, the fiscal capacity of a district is proving to be extremely critical to the health of the trust agreement. In the overwhelming majority of cases, the ability to arrive at an

amicable contract settlement, including a satisfactory salary increase for teachers, was crucial in setting an initial tone of good will. Because establishing these reforms is so time-intensive, the fact that many districts have been able to finance release time for teacher leaders and school teams has largely contributed to their success. As California, like other states, enters a phase of fiscal retrenchment, limited resources are certain to cause strains between teachers' unions and school districts at the same time that teachers expect their legal representatives to be protecting their economic interests and employment rights. Where programs are cut or teachers are threatened with layoffs, demoralization may result in the loss of commitment and willingness to invest time and energy and to make the new programs appear more like luxuries rather than necessities. The challenge for trust agreement leadership is to find ways to emphasize the utility of the new relationships, structures, and understandings in making good decisions about how to handle adversity.

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